



STATE OF CALIFORNIA  
DATA STORAGE  
FRANCHISE TAX BOARD  
PO BOX 1570  
RANCHO CORDOVA CA 95741-1570

**REQUEST FOR COPY OF PERSONAL INCOME TAX OR  
FIDUCIARY RETURN**

**Please see other side of this form to request Corporation (100, 100S, 100W, 100WE, or 199), Partnership (565), or Limited Liability Company (568) Returns.**

|  |   |      |
|--|---|------|
| Requester's Name                                   | Taxpayer's Name (as shown on return)  |      |
| Requester's Mailing Address                        | Taxpayer's Address (as shown on return)   |      |
|  | Taxpayer's Telephone Number   |      |
| Requester's Telephone Number                       | Social Security Number or FEIN  |      |
| Tax Years Requested                                | Spouse/Registered Domestic Partner (RDP) Social Security Number (if joint return filed) |      |
| Signature of Taxpayer or Authorized Representative | Type or Print Name  | Date |
| Signature of Spouse/RDP (if joint return filed)    | Type or Print Name  | Date |

If a paid preparer completed your tax returns, get a copy from the preparer to save you both time and money. **Attach a copy of the taxpayer's signed photo ID with this request for signature identification purposes (e.g., a California driver's license or a California identification card).**

**Copies of your personal income tax returns are only available for the last three and a half years from the date the returns were filed. There is a \$20.00 charge for each tax year requested.**

You **must** sign this request. Without proper authorization, we cannot provide you with the requested copies. If you are **not** the taxpayer, you must provide appropriate authorization to receive copies of tax returns or claims. Appropriate authorization includes one of the following:

- A letter signed by the taxpayer authorizing the Franchise Tax Board (FTB) to release the requested material to you and a photocopy of the taxpayer's ID.
- A current Power of Attorney (FTB 3520).
- An Internal Revenue Service Power of Attorney stating that it applies to FTB.
- A copy of FTB 3516 signed by the taxpayer and a photocopy of the taxpayer's ID.
- A certified copy of the letters of administration or testamentary dated within the past 12 months, if the taxpayer is deceased. If the letters are more than 12 months old, a clerk of the court must recertify them stating they are still in effect.

If a bankruptcy is involved and you are **not** the taxpayer, you must also provide one of the following:

- A court document appointing you as trustee.
- A letter signed by the trustee authorizing you to receive this material and a copy of the court documents appointing the trustee.

**Send a check or money order payable to the Franchise Tax Board for \$20.00 to the address above for each tax year you request. If the tax return was for a tax year in which you were a victim of a designated California state or federal disaster, there is no charge for a copy of your personal income tax return. For additional information, call 916.845.5375 (not toll free).**



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**REQUEST FOR COPY OF CORPORATION, EXEMPT  
ORGANIZATION, PARTNERSHIP, OR LIMITED  
LIABILITY COMPANY RETURN**

Please see other side of this form to request Personal Income Tax (540, 540A, 540EZ, 540NR, or Fiduciary [541]) Returns.

|   |  |   |   |
|---|--|---|---|
| Requester's Name  |  | Business/Corporation's Name (as shown on return)    |   |
| Requester's Mailing Address   |  | Business/Corporation's Address (as shown on return) |   |
| Tax Return Requested<br>(check box below)   | Taxable Years or<br>Fiscal Year End Date | Corporation Number                                  | Federal Employer<br>Identification Number |
| <input type="checkbox"/> 100 – Corporation Return   |  |   |   |
| <input type="checkbox"/> 100W – California Franchise or<br>Income Tax Water's-Edge<br>Corporation Return                      |  |   |   |
| <input type="checkbox"/> 100WE – Water's Edge<br>Corporation Return   |  |   |   |
| <input type="checkbox"/> 100S – S Corporation Return  |  |   |   |
| <input type="checkbox"/> 109 – Exempt Organization<br>Business Income Tax Return  |  |   |   |
| <input type="checkbox"/> 199 – Exempt Organization<br>Annual Information Return   |  |   |   |
| <input type="checkbox"/> 565 – Partnership Return   |  |   |   |
| <input type="checkbox"/> 568 – Limited Liability<br>Company Return  |  | California Secretary of State<br>Number             |   |
| Signature and Title of Officer or Trustee (Authorized Representative or<br>signature of the person who signed the tax return) |  | Type or Print Name                                  |   |
|   |  | Daytime Telephone Number                            | Date                                      |

If a paid preparer completed your tax returns, get a copy from the preparer to save you both time and money.

Copies of corporation, exempt organization, and limited liability company tax returns are only available for the last five years. Partnership returns are retained for three and a half years from the original date the return was filed. There is a \$20.00 charge for each tax year requested.

**A current authorized representative of the taxpayer must sign this request and provide the business title. Without proper authorization, we cannot provide the requested copies. Proper authorization includes:**

- Any person designated by action of its board of directors, or other similar governing body, upon submission of satisfactory evidence of such action.
- Any officer or employee of the corporation with a written request signed by any principal officer under the corporate seal, if any.
- A Power of Attorney.
- A letter of testamentary that appoints you as executor.
- A letter of administration that appoints you as administrator.
- A letter of conservatorship that appoints you as conservator.
- A court document that appoints you as trustee.

If a suspended corporation is involved, any amounts owed must be paid before we can send you the requested information. To determine the amount owed, please call one of the following numbers: from within the United States, 800.852.5711; from outside the United States (not toll-free), 916.845.6500; or for the hearing or speech impaired 800.822.6268.

If a bankruptcy is involved and you are **not** the taxpayer, you must also provide one of the following:

- A court document appointing you as trustee.
- A letter signed by the trustee authorizing you to receive this material and a copy of the court documents appointing the trustee.

Send a check or money order payable to the Franchise Tax Board for \$20.00 to the address above for each tax year you request. If the tax return was for a tax year in which you were a victim of a designated California state or federal disaster, then there is no charge for a copy of your tax return. For additional information, call 916.845.5116 (not toll free).